

Medical in ShelterPact

Detailed instructions with real ShelterPact screenshots

Interface reviewed October 12, 2026. Screenshots show fictional demo records. Available features and actions depend on organization modules, permissions, and record state.

Record examinations, treatments, medications, vaccinations, rabies certificates, and inventory use with accurate clinical history.

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Record an Examination, Treatment, Test, or Clinical Note

Medical entries preserve clinical events, planned care, and alerts. Record facts and provider information in Medical rather than using the animal's general notes as the only clinical history.

Before you begin: Open Shelter / Medical or Add Medical on the animal. Have the animal identity, provider, event date/time, and approved clinical documentation available.

Step-by-step instructions

1. Select New Medical Entry and confirm the Animal.
2. Select Entry Type: Examination, Diagnosis / Problem, Treatment / Procedure, Vaccine, Test, Medication, Weight, Medical Alert, or Medical Note as applicable.
3. Select Status to reflect the actual event. Completed means the event occurred; Due, Active, Pending, or Discontinued describe other states.
4. Enter Name / Description, Performed Date/Time, and Due Date/Time where relevant. Do not mark planned care as performed.
5. Record Provider / Veterinarian, Result, Value, Unit, and Notes as appropriate. Use the correct measurement unit and preserve the provider's directions.
6. If a completed event uses stock, review the inventory deduction option and select the correct product, location, lot when required, and quantity.
7. Select Save Medical Entry. Review it in Medical Records and on the animal's Medical section, including care state and any due timing.

Screenshots

Figure 1. New Medical Entry distinguishes event type, status, dates, provider, result, and inventory use. (part 1 of 2)

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THE ANIMAL CARE SOFTWARE FOR SHELTERS

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Animal Care

Medical

Operational m
treatment.

Today

Medic
Scheduled d

No m
Schede

OVERDUE
Past-due c

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SD

New Medical Entry

Medical Timeline

New Medical Entry

Record a clinical event, due item, or medication regimen.

Animal

Entry Type

Status

Name / Description

Performed Date/Time

Due Date/Time

Provider / Veterinarian

Result

Value

Unit

Deduct administered product from Inventory & Stock

Notes

Cancel

Save Medical Entry

Figure 1. New Medical Entry distinguishes event type, status, dates, provider, result, and inventory use. (part 2 of 2)

Figure 2. Medical Records provides care-state and record filters.

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Animal Care

Medical

Operational medical workspace for clinical history, medication administration, upcoming care, overdue items, and active treatment.

+ New Medical Entry

Today

Medical records

Documents

OVERDUE
Past-due care and medication doses 2

DUE SOON
Due within 30 days 0

ACTIVE
Open care or active regimen 0

COMPLETED
Completed or discontinued 8

ANIMAL

MEDICAL TYPE

RECORD STATUS

DUE STATE

Search animal, type, provider, result...

All animals

All types

All statuses

All due states

10 of 10 medical entries

Date	Animal	Type	Details	Care State	Actions
9/18/2026, 9:54:15 AM	DEMO-A-0017 - Biscuit	Medication	Fenbendazole Provider: Demo Veterinary Team Result: Preventive treatment Regimen: 7 days - 9/18/2026 - 9/24/2026	OVERDUE Record status: Active Ends 9/24/2026, 9:54:15 AM	MAR Edit Complete Discontinue
9/17/2026, 9:54:15 AM	DEMO-A-0016 - Hazel	Exam	Rabbit Wellness Exam Provider: Demo Veterinary Team Result: Normal exam	COMPLETED Record status: Completed No due date	Edit
9/16/2026, 9:54:15 AM	DEMO-A-0013 - Tux	Exam	Intake Exam Provider: Demo Veterinary Team Result: Mild URI signs	COMPLETED Record status: Completed No due date	Edit

Practical checks

This guide explains record entry. Clinical diagnosis, medication choice, route, and dose must come from the authorized provider or approved clinical protocol.

Troubleshooting

What you see	What to check
Planned care is shown as completed	Review and correct the record through its authorized Edit control.
A measurement seems incorrect	Check both the numeric value and unit rather than adjusting only the number.

Create a Medication Regimen and Review Its Schedule

A Medication entry can create recurring administrations using a first dose time, duration, and frequency. Review the schedule before saving so it matches the provider's order.

Before you begin: Have the prescribed medication, dose, route, start, frequency, duration, and provider information available. Open New Medical Entry.

Step-by-step instructions

1. Confirm the Animal and choose Entry Type Medication. Review the resulting Status, which switches to Active in the inspected form.
2. Enter Name / Description and First Dose / Treatment Start. The start date and time anchors the recurring schedule.
3. Enter Duration (days) and Frequency. The form provides once, twice, or three times daily, hourly intervals, and As needed options.
4. Review Treatment End / Last Scheduled Dose, which is calculated from the selected start, duration, and frequency.
5. Enter Provider / Veterinarian, Dose, Route, Result where relevant, and Notes. Confirm the dose and route against the authorized instructions.
6. Read Administration Schedule Preview. Verify the frequency, duration, number of scheduled doses, first time, and last time before saving.
7. Select Save Medical Entry. Review the regimen in Medical Records and its MAR. Use Today to review administrations due now or within the next eight hours.
8. Use an authorized edit or discontinuation when the provider changes the treatment. Preserve history rather than replacing the animal identity or erasing completed administrations.

Screenshots

Figure 1. Medication scheduling displays start, duration, frequency, dose, route, and schedule preview. (part 1 of 2)

Medical Timeline
New Medical Entry
Record a clinical event, due item, or medication regimen.

Animal
Select animal...

Entry Type
Medication

Status
Active

Name / Description
Exam, medication, clinical note...

First Dose / Treatment Start
10/12/2026, 03:58 PM
This date/time anchors the recurring administration schedule.

Duration (days)
7

Frequency
Twice daily

Treatment End / Last Scheduled Dose
10/19/2026, 03:58 AM
Calculated from the first dose, frequency, and duration.

Provider / Veterinarian

Result

Value
e.g. 42.5

Unit
lb, kg, °F...

Dose
e.g. 250 mg

Route
Oral, topical, SQ...

Figure 1. Medication scheduling displays start, duration, frequency, dose, route, and schedule preview. (part 2 of 2)

Practical checks

A schedule is not proof that a dose was administered. Record each administration through the available administration controls.

Troubleshooting

What you see	What to check
The dose count is unexpected	Review the start time, duration, and frequency; do not accept the preview without checking it.
An old regimen is overdue	Review its actual treatment state and administration history before completing or discontinuing it.

Review Due Care and the Medication Administration Record

Today and Medical Records support daily care review. MAR shows administration history for a medication regimen, while the care-state summary highlights overdue and upcoming work.

Before you begin: Open Medical and confirm the animal and medication before recording any administration. Check provider instructions and existing entries to avoid duplicate recording.

Step-by-step instructions

1. On Today, review Medication Administration for doses due now and within the next eight hours. Review Overdue, Due Soon, Active, and Completed summaries.
2. Use Medical Records to filter by Animal, Medical type, Record status, and Due state. Search name, provider, type, or result as needed.
3. Open MAR for a Medication row to review scheduled doses and administration history.
4. Where a due administration is shown, use its available recording control to document the actual event, time, and required details. Record only what occurred; use appropriate unavailable/not-given handling where provided by the workflow.
5. Confirm the administration appears in MAR and review any linked stock use. Do not separately deduct the same medication twice.
6. Use Complete or Discontinue on the regimen only when the treatment status should change under the provider's direction or agency process. Review the result afterward.

Screenshots

Figure 1. Filters separate the record status from the calculated care state.

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Animal Care

Medical

Operational medical workspace for clinical history, medication administration, upcoming care, overdue items, and active treatment.

+ New Medical Entry

Today

Medical records

Documents

OVERDUE
Past-due care and medication doses

2

DUE SOON
Due within 30 days

0

ACTIVE
Open care or active regimen

0

COMPLETED
Completed or discontinued

8

ANIMAL

All animals

MEDICAL TYPE

All types

RECORD STATUS

All statuses

DUE STATE

All due states

Search animal, type, provider, result...

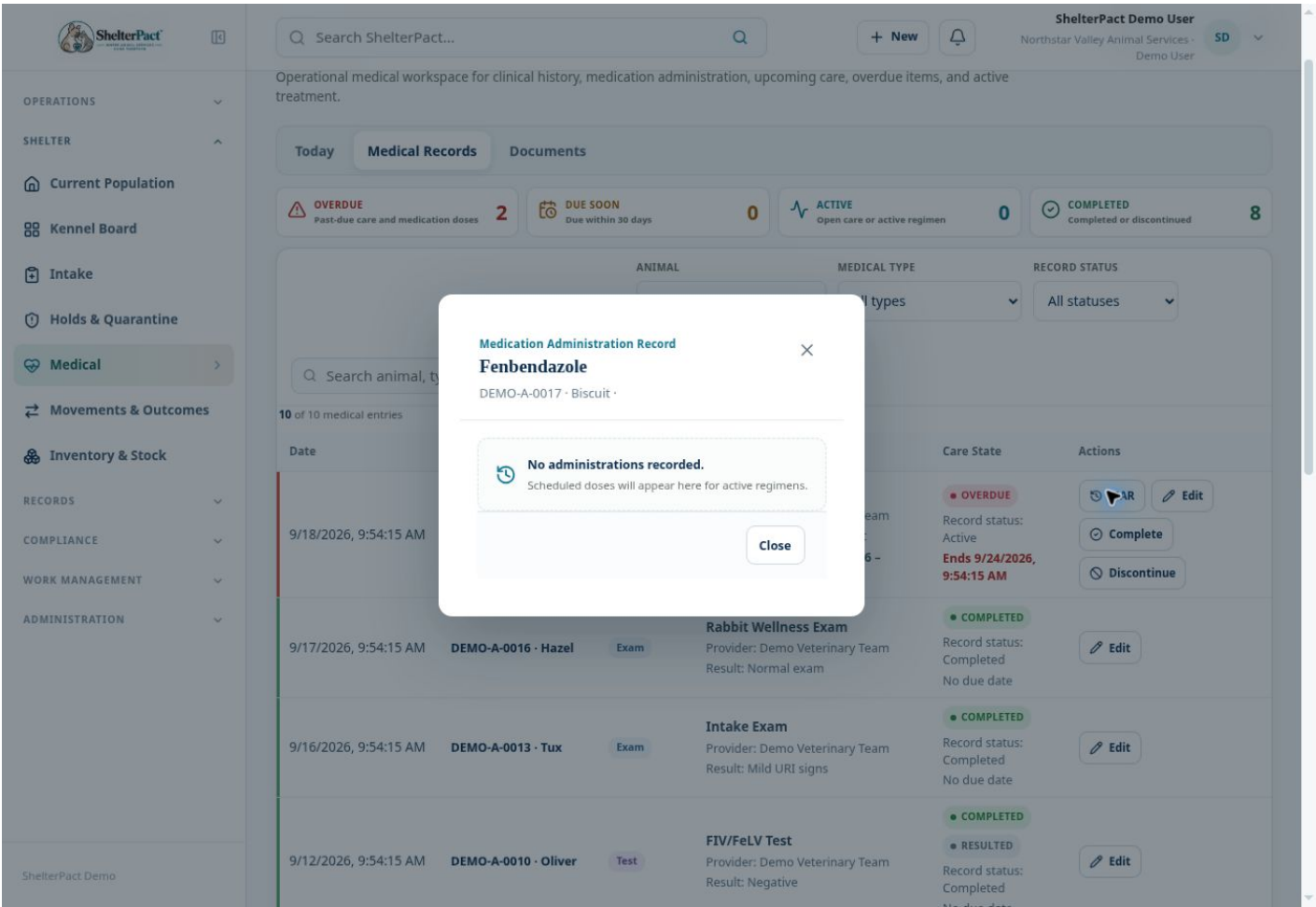
10 of 10 medical entries

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Figure 2. MAR provides administration history; this demo regimen has no administrations recorded.



Practical checks

The inspected older demo regimens do not display current scheduled administration rows. A MAR with no recorded administrations should not be read as proof of completed treatment.

Troubleshooting

What you see	What to check
Today has no doses but an old regimen is overdue	Review its dates and MAR; old or ended schedules can still need clinical reconciliation.
A dose seems duplicated	Review the recorded event and linked inventory transaction before making a correction.

Record a Vaccination and Issue a Rabies Certificate

Rabies Compliance creates a certificate record and a linked Vaccine entry in the animal's clinical history. A generic vaccine note does not necessarily create the compliance certificate.

Before you begin: Open Compliance / Rabies Compliance. Have the animal, provider, vaccine details, lot, vaccination date, and approved duration information available.

Step-by-step instructions

1. Select Record Rabies and confirm Animal. Review the Owner / responsible person associated with the animal.
2. Enter Rabies tag and choose Vaccine duration. Confirm Vaccinated date and Expiration / next due against the applicable provider documentation.
3. Enter Vaccine / product, Manufacturer, Lot / serial, Veterinarian / provider, Provider license number, and appropriate Notes.
4. If deducting stock, enable Deduct vaccine from inventory. Select the appropriate Inventory item, Stock location, quantity, and any lot selection required. Inventory becomes authoritative for product, manufacturer, and lot information.
5. Review Create rabies vaccination charge and Fee item. Decide according to organization policy; a vaccination entry and payment are separate events.
6. Select Record & Issue Certificate when all required information is correct. Review the resulting certificate number, tag, dates, status, and linked medical entry.
7. Use Document in the rabies register to review the generated certificate and any signature/finalization requirements before providing an official copy.

Screenshots

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Refresh

+ Record Rabies

Total history
6
certificate records

All statuses 6 records

CURRENTDocumentVoid

CURRENTDocumentVoid

CURRENTDocumentVoid

PIREDDocumentVoid

PIREDDocumentVoid

CURRENTDocumentVoid

Rabies Compliance

Record Rabies Vaccination

X

Creates both a compliance certificate record and a linked Vaccine entry in the animal medical history.

Animal *

Select animal...

Owner / responsible person

No owner linked

Rabies tag

Vaccine duration

1 year

Vaccinated date

10/12/2026

Expiration / next due

10/12/2027

Vaccine / product

Rabies

Manufacturer

Lot / serial

Veterinarian / provider

Provider license number

Notes

☐ Deduct vaccine from inventory

Records an ISSUE transaction against the selected stock item and links it to this vaccination's medical entry.

☒ Create rabies vaccination charge

Uses the selected active rabies fee item and links it to the animal/owner.

Fee item

Rabies Vaccination · \$5.00

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Downloaded from <http://ajph.org/> on November 10, 2015

Figure 2. Inventory deduction makes the selected product and stock details authoritative. (part 1 of 2)

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Create both a compliance certificate record and a linked vaccine entry in the animal medical history.

New

Animal *

Select animal...

Owner / responsible person

No owner linked

Rabies tag

Vaccine duration

1 year

Vaccinated date

10/12/2026

Expiration / next due

10/12/2027

Vaccine / product

Rabies

Manufacturer

Lot / serial

Veterinarian / provider

Provider license number

Notes

Deduct vaccine from inventory

Records an ISSUE transaction against the selected stock item and links it to this vaccination's medical entry.

Inventory item *

Select vaccine stock...

Stock location *

Select location...

Quantity used *

1

When stock deduction is enabled, the selected inventory item is authoritative for vaccine product, manufacturer, and lot information. ShelterPact prevents insufficient stock and expired-lot use according to Inventory settings.

Create rabies vaccination charge

Uses the selected active rabies fee item and links it to the animal/owner.

Refresh

+ Record Rabies

Total history

6

certificate records

All statuses ▾ 6 records

CURRENT

Document

Void

CURRENT

Document

Void

CURRENT

Document

Void

EXPIRED

Document

Void

EXPIRED

Document

Void

CURRENT

Document

Void

Figure 2. Inventory deduction makes the selected product and stock details authoritative. (part 2 of 2)

Practical checks

Do not accept an automatically calculated expiration without verifying it against the actual authorized vaccination information.

Troubleshooting

What you see	What to check
No owner is linked	Review the animal's People relationships before issuing owner-related documents or charges.
Product fields are disabled	Inventory deduction is enabled; select the correct stock item rather than typing conflicting product data.
A vaccination appears twice clinically	Check whether the rabies workflow already created its linked Vaccine entry before adding a separate generic entry.

Record Stock Receipts, Use, Transfers, and Adjustments

Inventory & Stock calculates balances from an auditable ledger. Record movements in the correct units and locations so clinical use and supply balances remain consistent.

Before you begin: Open Shelter / Inventory & Stock. Confirm item, unit, physical location, actual quantity, and lot/expiration information where tracked.

Step-by-step instructions

1. On Stock, select the Item and Action: Receive Stock, Issue / Use Stock, Return to Stock, Adjustment, Waste / Disposal, or Transfer Between Locations.
2. Choose the correct Location and Quantity. For a transfer, review the destination controls shown for that action.
3. Review unit cost for receipts or valuation where applicable. Add Reference, Reason, and Notes to explain the movement.
4. For tracked stock, select or enter the required lot/batch and expiration information. Verify it against the physical product.
5. Select Record Movement after checking the full entry. Review Current Stock at the affected location.
6. Open Ledger and verify the item, signed quantity, action, location, staff, reference, lot, and expiration. The inspected ledger shows the latest 250 transactions.
7. For stock deducted through a completed medical or rabies event, review the linked issue rather than recording the same use again manually.

Screenshots

Figure 1. Stock provides movement actions and current item/location balances.



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Shelter Operations

Inventory & Stock

Track supplies by location, lot, and expiration with an auditable stock ledger.

ACTIVE ITEMS
7
0 retired

LOW STOCK
0
At or below reorder

OUT OF STOCK
0
Needs replenishment

EXPIRING SOON
0
Within 30 days

EXPIRED LOTS
0
Positive balance remains

INVENTORY VALUE
\$1,132.85
On hand × unit cost

Stock

Lots & Alerts

Ledger

Items

Locations

Categories

Record Stock Movement

Tracked items use lot-level balances. FEFO recommendations prefer the earliest usable expiration.

Item *

Select item

Action *

Receive Stock

Location *

Select location

Quantity *

Unit Cost

Reference

PO, invoice, case, i

Reason

Why is stock chan

Notes

Current Stock

On-hand totals are calculated from the immutable ledger.

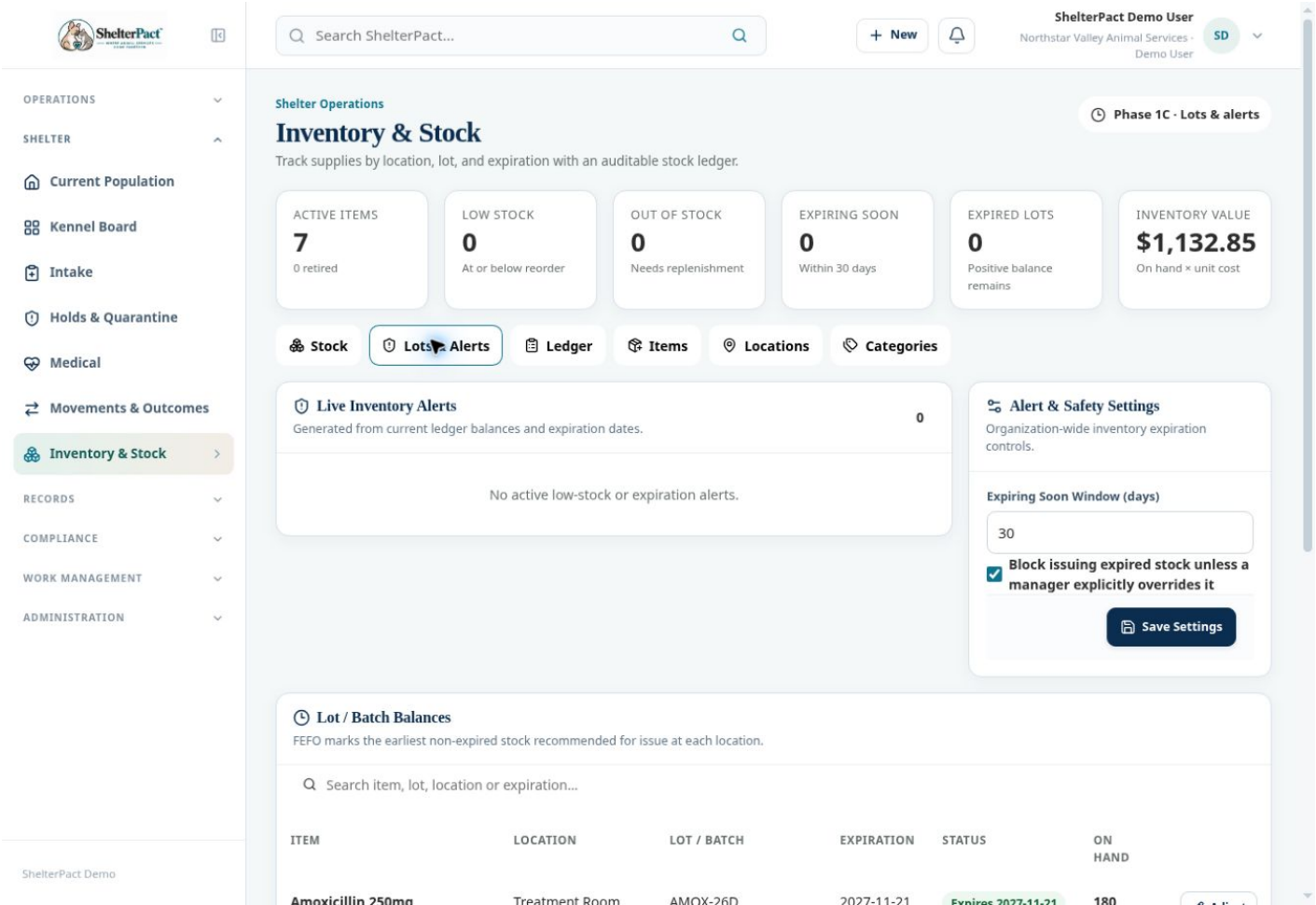
Search item or stock location...

ITEM	LOCATION	ON HAND	UNIT	
Amoxicillin 250mg NVAS-AMOX250	Treatment Room TREAT	180	tablet	Edit Stock
Carprofen 75mg NVAS-CARP75	Treatment Room TREAT	86	tablet	Edit Stock
DHPP Vaccine NVAS-DHPP	Medical Refrigerator MED-FRIDGE	30	dose	Edit Stock
Exam Gloves - Medium NVAS-GLOVE-M	Supply Room SUPPLY	18	box	Edit Stock
FVRCP Vaccine NVAS-FVRCP	Medical Refrigerator MED-FRIDGE	24	dose	Edit Stock
Microchip	Treatment Room	63	each	Edit Stock

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Figure 2. Lot balances preserve expiration and recommended-use information.



Practical checks

A clinical dose and an inventory quantity can have different units. Record stock according to the item's unit, not an assumed clinical unit.

Troubleshooting

What you see	What to check
A balance is wrong	Review the ledger and actual physical quantity; make an authorized, explained adjustment rather than hiding history.
A transfer seems to reduce total stock	Review both source and destination entries and units.

Review Lots, Expiration, and Low-Stock Alerts

Lots & Alerts supports replenishment and safe stock selection. FEFO recommends the earliest usable expiration for a particular item and location.

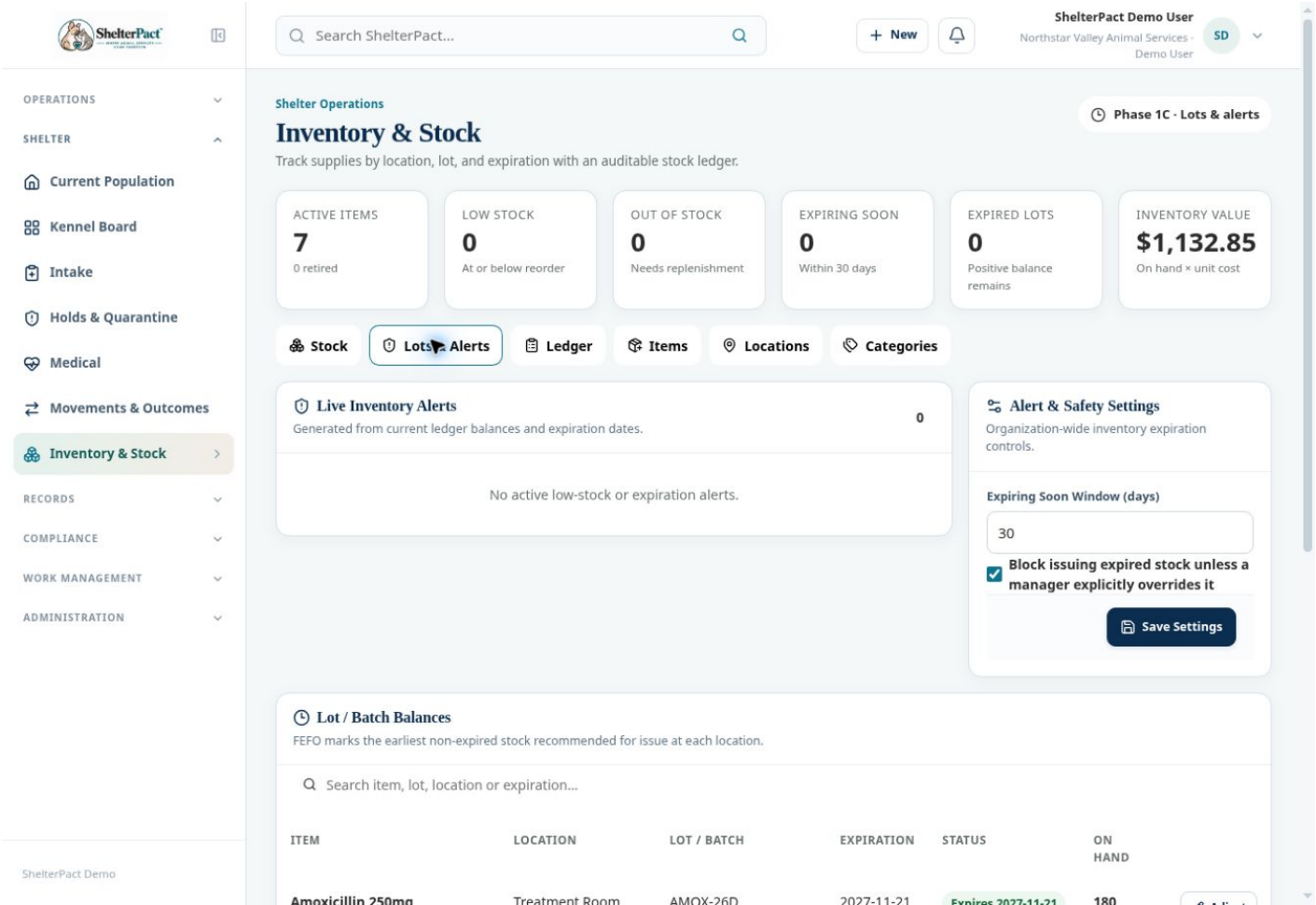
Before you begin: Open Inventory & Stock / Lots & Alerts. Confirm that item reorder settings and lot records reflect the products actually held.

Step-by-step instructions

1. Review summary cards for Low Stock, Out of Stock, Expiring Soon, and Expired Lots.
2. Review Live Inventory Alerts and open the relevant item/location records. Check whether a flagged balance is available in the location where staff need it.
3. Read Lot / Batch Balances, including expiration, status, and on-hand amount. FEFO recommended identifies the earliest non-expired stock in the inspected view.
4. Inspect expired lots with remaining balance. Handle disposal or other authorized action through the stock movement process.
5. An authorized inventory manager can review Expiring Soon Window and the setting blocking expired-stock issues. Do not weaken the setting to make a transaction go through.
6. Review Items, Locations, and Categories to maintain the catalog, storage locations, and organization. Confirm the relevant item and lot again when selecting stock in a clinical workflow.

Screenshots

Figure 1. Expiration alerts and lot-level balances help staff select usable stock.



Practical checks

A recommendation is a selection aid, not a clinical authorization. Verify the product, physical lot, expiration, and storage handling.

Troubleshooting

What you see	What to check
No alert appears for a product needing reorder	Review the item's reorder configuration, actual balance, and location.
Expired stock remains on hand	Record the authorized disposal or corrective movement and verify the resulting lot balance.